



CONFIDENTIAL
QUESTIONNAIRE

Woodward Financial Advisors, Inc.
1504 E. Franklin Street, Suite 105
Chapel Hill, NC 27514
(919) 929-2495

PERSONAL INFORMATION

CLIENT 1

Name	US Citizen?	
Birthdate	Age	
Street Address		
City	State	Zip Code
Phone	Work Phone	
Occupation	Employer	
Email	Fax	
Annual Income from Employment		

CLIENT 2

Name	US Citizen?
Birthdate	Age
Occupation	Employer
Phone	Work Phone
Email	Fax
Annual Income from Employment	
Referred by	

CHILDREN

Name	Birthdate	Age
Sex	Marital Status	# of Children
Name	Birthdate	Age
Sex	Marital Status	# of Children
Name	Birthdate	Age
Sex	Marital Status	# of Children
Name	Birthdate	Age
Sex	Marital Status	# of Children

ADVISORS

Attorney(s)
Accountant / Tax Advisor
Banker
Broker / Investment Advisor
Auto / Home / Liability Insurance Agent
Life & Health Insurance Agents
Trust Officer

A S S E T S

CASH EQUIVALENTS

Checking & Savings _____

Money Markets & CDs _____

Annuities _____

Life Insurance Cash Value _____

I N V E S T M E N T S

Stocks / Bonds / Mutual Funds _____

Stocks / Bonds / Mutual Funds _____

R E T I R E M E N T A C C O U N T S

IRA Accounts _____

401k / Thrift Plans _____

403b / Tax Sheltered Annuities _____

Deferred Compensation Plans _____

ESOP / ESPP / Stock Options _____

R E A L E S T A T E

Principal Residence _____

Vacation/Investment Property _____

B U S I N E S S I N T E R E S T S _____

L I A B I L I T I E S

CREDIT CARD DEBT _____

AUTO LOANS _____

HOME MORTGAGES _____

HOME EQUITY LOANS _____

PERSONAL LOANS _____

STUDENT LOANS _____

BUSINESS LOANS _____

F I N A N C I A L P L A N N I N G P R I O R I T I E S

List your three most pressing financial concerns in order of importance.

1.

2.

3.